

Daily Market Update

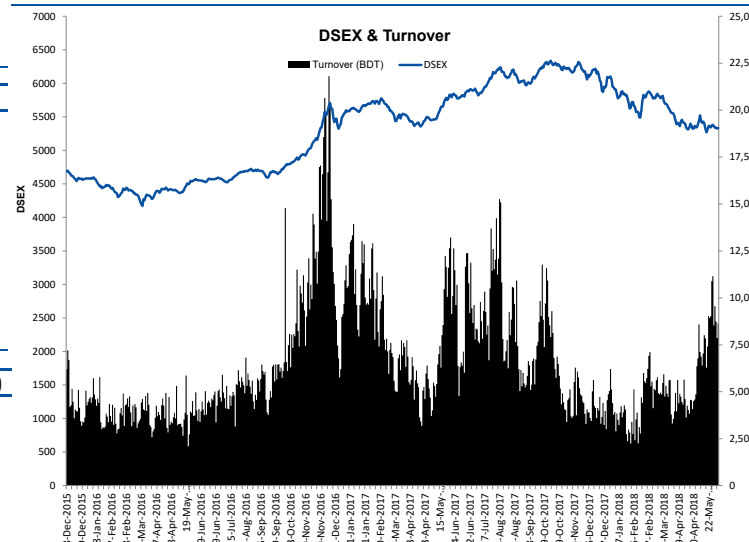
Market closed in green today. The benchmark index DSEX (+0.16%) gained 8.70 points and closed at 5,334.18 points today. The blue-chip index DS30 (+0.30%) and the shariah based index DSES (+0.48%) both closed in green. Most of the Large cap sectors showed positive performance today. Engineering experienced the highest gain of 1.09% followed by Pharmaceuticals (+0.81%), Telecommunication (+0.79%) and NBFIs (+0.17%). Banks posted the highest lose of 0.68% followed by Power (-0.24%). Total turnover stood at BDT 8.6 billion (USD 103.9 million). KDS Accessories Limited (+10.0%) was the most traded share with a turnover of BDT 323.9 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,301.42	1,310.28	-8.86	-0.68%	30	531,028.8	16.06%	385.6	4.63%
NBFIs	2,188.84	2,185.19	3.65	0.17%	23	196,871.1	5.95%	172.8	2.08%
Mutual Funds	746.50	751.25	-4.75	-0.63%	37	40,044.5	1.21%	28.7	0.34%
General Insurance	1,359.61	1,366.61	-7.00	-0.51%	35	36,953.2	1.12%	25.1	0.30%
Life Insurance	1,686.77	1,689.79	-3.02	-0.18%	12	47,029.6	1.42%	61.2	0.73%
Telecommunication	5,542.01	5,498.60	43.41	0.79%	2	557,010.6	16.85%	125.1	1.50%
Pharmaceuticals	2,692.42	2,670.90	21.52	0.81%	29	506,613.4	15.32%	703.7	8.45%
Fuel & Power	1,713.14	1,717.17	-4.04	-0.24%	19	424,658.9	12.84%	688.8	8.27%
Cement	1,924.34	1,934.64	-10.30	-0.53%	7	117,027.6	3.54%	96.1	1.15%
Services & Real Estate	1,083.93	1,076.32	7.61	0.71%	8	42,129.3	1.27%	311.8	3.74%
Engineering	3,066.03	3,032.97	33.06	1.09%	36	200,860.8	6.07%	1,830.1	21.97%
Food & Allied	14,187.16	14,123.95	63.22	0.45%	18	264,707.6	8.01%	393.7	4.73%
IT	1,536.45	1,514.18	22.27	1.47%	8	16,987.2	0.51%	269.2	3.23%
Textiles	1,293.97	1,281.57	12.40	0.97%	50	127,519.1	3.86%	1,349.4	16.20%
Paper & Printing	14,195.44	13,444.63	750.81	5.58%	2	27,165.3	0.82%	263.0	3.16%
Tannery	2,729.37	2,668.93	60.45	2.26%	6	28,504.2	0.86%	376.3	4.52%
Jute	8,207.66	8,167.92	39.74	0.49%	3	1,813.9	0.05%	40.8	0.49%
Ceramics	682.27	678.25	4.02	0.59%	5	32,764.5	0.99%	249.5	3.00%
Miscellaneous	2,000.40	2,021.86	-21.46	-1.06%	12	106,908.7	3.23%	957.7	11.50%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
United Airways (BD) Ltd.	4.40	10.0%	7.45
KDS Accessories Limited	107.10	10.0%	323.9
Bengal Windsor Thermoplastics Ltd	39.80	9.9%	24.2
Imam Button	33.30	9.9%	1.0
Dulamia Cotton	35.90	9.8%	.5
Sonargaon Textiles	20.30	9.7%	2.2
Emerald Oil Industries Ltd.	13.00	9.2%	3.9
ACI Formulations	177.50	9.0%	34.3
Apex Foods	243.60	8.7%	68.3
The Ibn Sina	286.70	8.7%	119.3

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
BIFC	6.30	-10.0%	.37
Global Insurance Ltd.	13.10	-7.7%	.9
Sonar Bangla Ins	16.90	-6.1%	2.0
SK Trims & Industries Limited	35.90	-6.0%	125.8
Dacca Dyeing	6.70	-5.6%	1.7
BD Finance	13.20	-5.0%	7.0
Rupali Life Insurance Co. Ltd.	40.70	-4.9%	23.5
Heidelberg Cement	358.80	-4.8%	6.9
Premier Leasing	10.00	-4.8%	2.7
Vanguard AML BD Finance Mutual Fund One	8.60	-4.4%	.1

Most Traded Share	Close	Δ%	Turnover (mn BDT)
KDS Accessories Limited	107.10	10.0%	323.9
Aman Feed Limited	65.30	7.6%	258.9
Bashundhara Paper Mills Limited	142.90	5.8%	248.2
BBS Cables Limited	95.40	6.7%	230.5
The Peninsula Chittagong Limited	33.90	7.3%	218.5
Monno Ceramic	387.00	6.3%	210.6
United Power Generation & Distribution Company Ltd	306.20	-1.3%	182.6
Legacy Footwear	193.80	4.9%	174.8
Anwar Galvanizing	120.20	4.8%	162.4
Shasha Denim Limited	68.30	7.6%	157.9



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	5,334.18	5,325.48	8.70	0.16%	-14.58%
DS30	1,899.98	1,894.38	5.60	0.30%	-16.79%
DSES	1,269.10	1,263.00	6.11	0.48%	-8.74%

	Advanced	Declined	Unchanged	Total
All Category	137	169	35	341
A Category (Equity)	97	148	28	273
B Category (Equity)	8	8	2	18
N Category (Equity)	2	3	0	5
Z Category (Equity)	30	10	5	45
Mutual Funds	4	16	15	35
Corporate Bonds	1	0	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,867,834.6	3,858,732.3	
	Mn USD	46,527.5	46,418.0	0.2%
Turnover	Mn BDT	8,635.4	7,860.6	
	Mn USD	103.9	94.6	9.9%
Volume	Mn Shares	171.3	157.9	8.5%
		182,742	180,067	1.5%

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
AFCAGRO	AFC Agro Biotech Ltd.		0.0%	0.0%	N/A	19-Jul-2018
JANATAINS	Janata Insurance Company Limited		5.0%	0.0%	Dec-2017	31-Jul-2018

Important DSE News
BRACBANK

Referring to its earlier disclosure disseminated on 14.03.2018 regarding decision to increase Authorized Capital from Tk. 1,200.00 crore to Tk. 2,000.00 crore, the Company has further informed that they have increased their Authorized Capital to Tk. 2,000.00 crore as per earlier decision, after obtaining approval from Bangladesh Bank.

UNITEDINS

Camellia Duncan Foundation, one of the Corporate Directors of the Company, has expressed its intention to sell 3,55,900 shares out of its total holding of 60,91,261 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

BLI

The Company has informed that it has disbursed the final cash dividend for the year ended on December 31, 2017 to the respective shareholders' Bank Account through BEFTN. The folio holders will get warrants at their mailing address.

DHAKABANK

Ms. Rakhi Das Gupta, one of the Sponsors of the Company, has further reported that she has completed her buying of 1,80,000 shares of the Company at prevailing market price through Stock Exchange as announced earlier.

FAREASTFIN

Mr. M.A. Wahhab, one of the Directors of the Company, has further reported that he has completed his sale of 20,00,000 shares of the Company at prevailing market price through Stock Exchange as announced earlier.

BAYLEASING

Mrs. Fatema Zahir Majumder, one of the Sponsors of the Company has expressed her intention to receive 9,98,550 shares of the Company from her Spouse Mr. Abdullah Al Zahir, by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

AFCAGRO

Trading of the shares of the Company will remain suspended on record date i.e., 19.07.2018 for EGM.

ICB2NDNRB

Trading of the units of the Fund will be allowed only in the Spot Market and Block transactions will also be settled as per Spot settlement cycle from 19.07.2018 to 22.07.2018. Trading of the units of the Fund

will remain suspended from "Trade Suspension Date" (Record Date) i.e. 23.07.2018.

ICB

Referring to its earlier disclosure disseminated on 08.04.2018 regarding Board decision to issue ICB Subordinated Bond, ICB has further informed that the BSEC has given its consent to ICB to issue ICB Subordinated Bond of Tk. 2,000.00 crore for 7 years (including 2 years grace period) (fully redeemable).

RAKCERAMIC

(Q2 Un-audited): Consolidated EPS was Tk. 0.37 for April-June 2018 as against Tk. 0.74 for April-June 2017; Consolidated EPS was Tk. 0.99 for January-June 2018 as against Tk. 1.26 for January-June 2017. Consolidated NOCFPS was Tk. (0.24) for January-June 2018 as against Tk. 1.98 for January-June 2017. Consolidated NAV per share was Tk. 16.68 as on June 30, 2018 and Tk. 16.76 as on June 30, 2017.

BERGERPBL

(Q1 Un-audited): Consolidated EPS was Tk. 14.78 for April-June 2018 as against Tk. 18.40 for April-June 2017; Consolidated NOCFPS was Tk. (6.76) for April-June 2018 as against Tk. 10.10 for April-June 2017. Consolidated NAV per share was Tk. 298.89 as on June 30, 2018 and Tk. 284.11 as on March 31, 2018.

HEIDELBCEM

The Company has further informed that the Board of Directors has approved the draft scheme of Amalgamation of the Meghna Energy Limited with the HeidelbergCement Bangladesh Limited subject to sanction by the Hon'ble High Court Division of the Supreme Court of Bangladesh and approval of the same by the members of the Company and Meghna Energy Limited.

HEIDELBCEM

Consolidated EPS was Tk. 4.21 for April-June 2018 as against Tk. 6.40 for April-June 2017; Consolidated EPS was Tk. 9.55 for January-June 2018 as against Tk. 12.71 for January-June 2017. Consolidated NOCFPS was Tk. 10.81 for January-June 2018 as against Tk. 14.74 for January-June 2017. Consolidated NAV per share was Tk. 77.72 as on June 30, 2018 and Tk. 83.17 as on December 31, 2017. It is to be noted that compared to same period of previous year 2017, NAV per share was reduced due to charging of regular depreciation. EPS was declined by Tk. 3.16 due to higher cost of goods sold. NOCFPS was reduced by Tk. 3.93 mainly for more supplier payments.